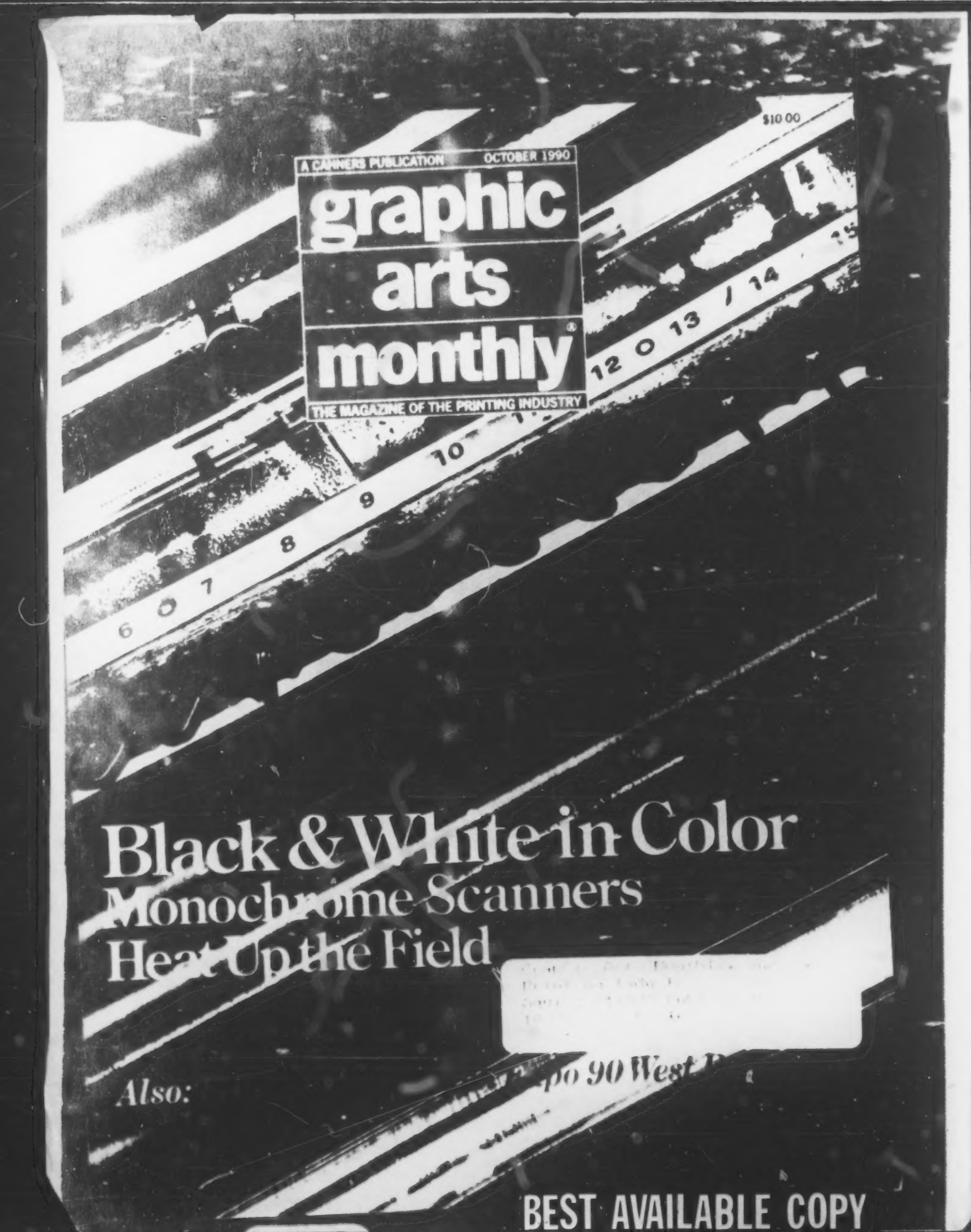

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THE MAGAZINE OF THE PRINTING INDUSTRY

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Vice-President and Publisher
Ronald C. Andriani

Editor Roger Yhostroza

Managing Editor Michael Karol

Associate Editors Earl Wilken, Lisa Cross

Assistant Editor Bridget Kinsella

Art Director Karen Lehrer

Production Editor Mick Andreano

Special Projects Manager
Peter Johnston

Project Editor Debora Cleah Toth

Midwest Editor
Bill Esler (312) 226-4641

Contributing Editors
William H. Bureau, Kenneth P. Garner, Dick Gorelick, George Griffin, Dr. Gerald A. Silver, Nancy Plowman, Theodore Lustig

Classified Advertising Manager
Kevin D. Thomas (212) 463-6643

Direct Marketing Manager
Richard Negri (212) 463-6627

Business Manager
Jerry Arotsky (212) 463-6633
Facsimile (212) 463-6653

Contracts Coordinator
Jeffrey Rothstein (212) 463-6608

Production Manager
Daniel Coakley (212) 463-6545
Facsimile (212) 463-6560

Promotion Manager
Dorian Torregrossa

Research Manager Angela Venturino

Assistant to the Publisher
Holly Hoffman

Sales Administrator Elisa Balsamo

Reprints Carol Baer (708) 390-2235

Circulation Manager
Carla Keller (303) 388-4623

Subscriptions/Customer Service
(800) 637-6089

249 W. 17th St., New York, N.Y. 10011
Sales offices: (212) 463-6628
Editorial offices: (212) 463-6834
Facsimile (212) 242-6987

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Consumer Caution Affects Retail Spending Patterns

On top of slowing income growth and sluggish overall economic growth, add consumer concerns caused by the Middle East crisis. Responding to these new developments, the consumer confidence index dropped precipitously in August to 83.8 (1985 = 100), a level not seen since early 1983 (and five consecutive months of decline).

Reflecting this nervousness, consumer spending has been sluggish, at best. Retail sales totaled $149.5 billion in July 1990, up 2.8% above the year-ago total. Year-to-date sales increased 4.1% above the same period in 1989. Inflation-adjusted growth reached only 0.5%.

The consumer sector surely will not lead the impending economic upturn. Our forecast of retail sales calls for 4.8% growth this year, followed by a 6.1% gain in 1991. In real terms, this translates into gains of 0.5% and 0.8%. Nonetheless, once the upturn begins and confidence is regained, consumer spending should resume.

The consumer sector's sluggishness holds widespread implications for commercial printers. First of all, slowing retail sales dampen demand for print advertising expenditures. We have already seen this effect in the newspaper sector. As such, print activity stemming from print advertising in newspapers and magazines will remain stagnant through the end of this year.

Secondly, printers engaged in printing reading materials, such as books, magazines, and periodicals, will also see a slowdown in activity. While not as income-sensitive as higher-priced items like appliances and automobiles, consumer spending on reading materials relies on overall economic trends and their impact on income growth.

Finally, consumer expenditures on personal and business services dictate the level of business in these industries and, ultimately, the need for printed forms and documents. As consumers reconsider their spending plans, companies providing legal, financial, and real estate services will see a cutback in their business activity levels.

The printing and publishing industry remains one of the fastest-growing in terms of employment growth. Employment increased by 12,100 in the first half of 1990, and is headed for a 1.6% rise by year-end. With industry output growth outpacing employment growth, the result is further gains in productivity. To date, productivity is up 2.4% above last year. Wages, on the other hand, have been heating up. Following five years of modest gains, wages are headed for increases of 3.4% to 3.8% over the next few years.

PRINTING INDUSTRY SUPPLY INDICATORS

				Annual Percent Change			
	June 89	May 90	June 90	1989	1990	1991	1992
Employment							
Printing & publishing (1)	1010.1	1028.7	1013.9	2.9	1.6	2.2	3.0
Commercial printing (1)	429.6	440.4	434.1	4.5	2.0	2.4	3.7
Productivity							
Printing & publishing (2)	105.7	103.1	108.6	5.1	2.1	3.0	3.6
Average Hourly Earnings							
Printing & publishing (3)	10.79	11.35	11.35	4.4	5.1	5.5	5.8
Commercial printing (3)	10.99	11.45	11.46	5.1	3.6	4.2	4.3
Paper shipments							
Coated paper (4)	586	621	603	2.6	1.1	9.0	2.1
Uncoated groundwood (4)	159	141	145	10.0	3.1	5.9	2.7
Uncoated free sheet (4)	868	938	910	2.6	6.1	5.6	1.6
	88/89	89/90	90/91	1989	1990	1991	1992
Graphic Arts Machinery							
New orders (5)	153.2	163.9	152.2	1.0	9.8	7.7	1.3
Shipments (5)	163.2	146.0	146.4	1.5	3.1	16.1	3.8
Graphic Arts Supplies							
Shipments (5)	142.2	150.8	151.4	1.5	3.1	5.3	1.0

graphic arts monthly

Pacific Region

Over the course of this leisurely survey of the printing industry as it flourishes (or, rarely, doesn't flourish) in the various regions of these United States, we've had occasion from time to time to remark over the tendency of some states to dominate their region. Texas, for example. Colorado. Illinois.

Those states, however, are mere amateurs of domination compared to what we've got on our hands this month. By any standard of measurement known to the standard bearers of demography, including printing, California stands out in the Pacific.

Jana Brenning

Alaska is geographically the largest state, of course, and is also in this region. But more than 50 times as many people live in California as live in Alaska. Even Washington, the next contender in the Pacific region, has only about one-sixth the population of California. The others, Oregon and Hawaii, are smaller still.

Different as each state is, the Pacific region is a healthy one. All the states except Oregon show sizeable increases in population; all have young populations which are educated well beyond the national norm. Except for Oregon, they also perform well above the norm in terms of per capita income.

Most of the Pacific region's printing industry is, as expected, in California. The industry profile is a bit different than the national pattern. There are proportionally fewer large printers and more small ones, especially quick printers; the Pacific region has 11.6% of total U.S. commercial printing volume, but just over 20% of quick printers.

In terms of employment growth (as shown in the charts, measured 1982-88), the industry is doing well in the Pacific region. Growth in Hawaii was a spectacular 68%, far above the general population gain—not to mention "other manufacturing", of which there is precious little in the islands, the Pacific Ocean being something of an obstacle to the free flow of goods. The others are doing well in both categories; Alaska, in fact, shows a 30% growth in "other manufacturing", one of the few states in which this catogory is ahead of printing growth.

Data for these reports come primarily from Printing Industries of America, the National Association of Printers and Lithographers, the U.S. Bureau of the Census, Trade and Technology Press of Stamford, Conn. (the publishers of *Printmarkets*, a highly useful source of industry data), and GAM's own database.

Reprints of this installation of the Geography of Print may be ordered from Carol Bien, Cahners Publishing, Reprint Department, 1350 East Touhy Ave., Des Plaines, Ill., 60018.

By Peter Johnston
Special Projects Manager

Regional Overview

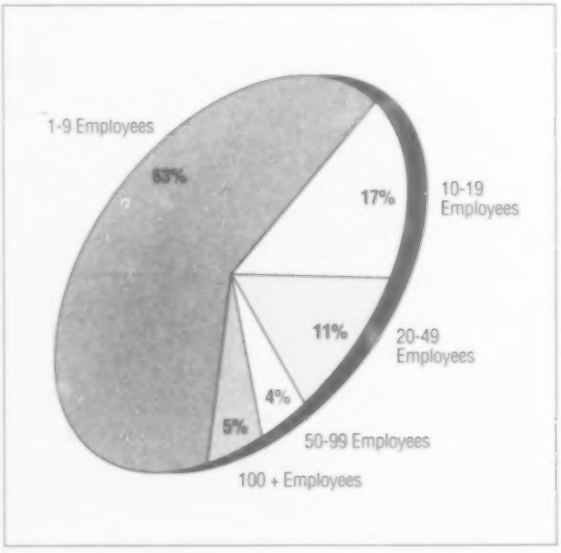
Note that these figures, taken from the GAM database, reflect the universe of printers in its widest sense. In most of the data on the next three pages, a smaller, though nonetheless still very large, universe of printers will be used. This is because we will be concerned with the way the printing industry in the Pacific region is divided up in terms of markets. This requires us to exclude newspapers, inplant printers, and certain other plants. These businesses, while clearly printers, are not *economically measurable* as printers.

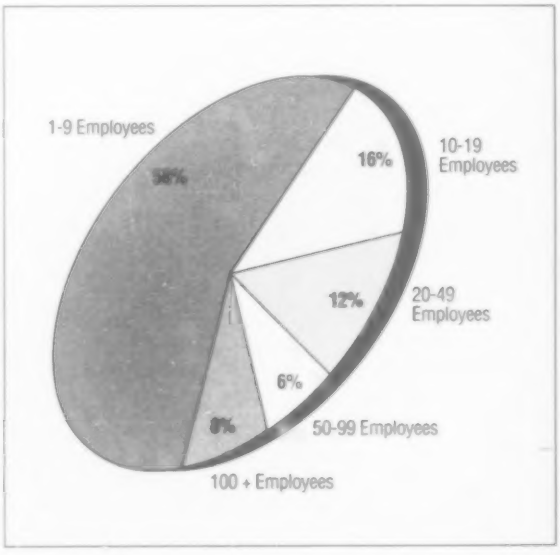
Pacific Region, Plants by Employee Count

Size	# of Plants	% of Region
1–9 Employees	5,158	63%
10–19 Employees	1,353	17%
20–49 Employees	868	11%
50–99 Employees	371	4%
100 + Employees	442	5%
TOTAL	**8,192**	**100%**

United States, Plants by Employee Count

Size	# of Plants	% of Total
1–9 Employees	29,815	58%
10–19 Employees	8,381	16%
20–49 Employees	6,428	12%
50–99 Employees	3,147	6%
100 + Employees	3,846	8%
TOTAL	**51,617**	**100%**





Charts and graphs by Lisa Hilgers

Plants by Function

Overall, the Pacific region accounts for about 11.6% of the total U.S. industry, as measured by value of shipments (gross sales). Publication, quick, and trade printers are heavily concentrated here.

Function	# of Plants	% of U.S. Total
Commercial	4,053	15.6%
Newspaper (w/ Commercial)	144	8.9%
Newspaper (w/o Commercial)	355	15.7%
Book & Pub	451	17.8%
Business Forms	114	14.5%
Converters	210	11.2%
Noncommercial	1,154	15.0%
Trade	781	18.3%
Quick Printers	930	20.3%

Equipment Distribution

Equipment	Sites in Region	% of U.S. Total
Color Scanners	351	13.5%
Sheetfed Presses	5,702	24.0%
Heatset Web Offset Presses	493	12.9%
Folders	4,521	14.6%

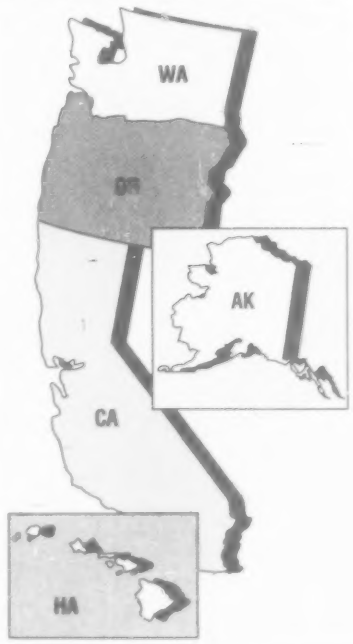
These figures represent not pieces of equipment but sites where that equipment can be found. As can be seen, the region is slightly over-represented in terms of almost everything; the relative isolation of the West Coast requires it to be self-sufficient. The heavy concentration of sheetfed capacity points to the disproportionate incidence of small commercial and quick printers in the region. Just printing for California means you're printing for 11% of the U.S. population.

Commercial Printing

Value of Shipments

As noted in the introduction, most of the economic—and printing—action in the Pacific region is in California. At 82.5% of the region's commercial sales, it is clearly so different from its neighbors as to exist in a category by itself. By contrast, in any of the big Eastern states, you'll find more printing than Hawaii, Alaska, Oregon and Washington combined; as a matter of fact, there are *blocks* in New York or Chicago with more printing volume than most of these states.

State	Sales	%
California	6,500	82.5%
Washington	648	8.2%
Oregon	572	7.3%
Hawaii	127	1.6%
Alaska	35	0.4%
TOTAL	**7,882**	**100%**

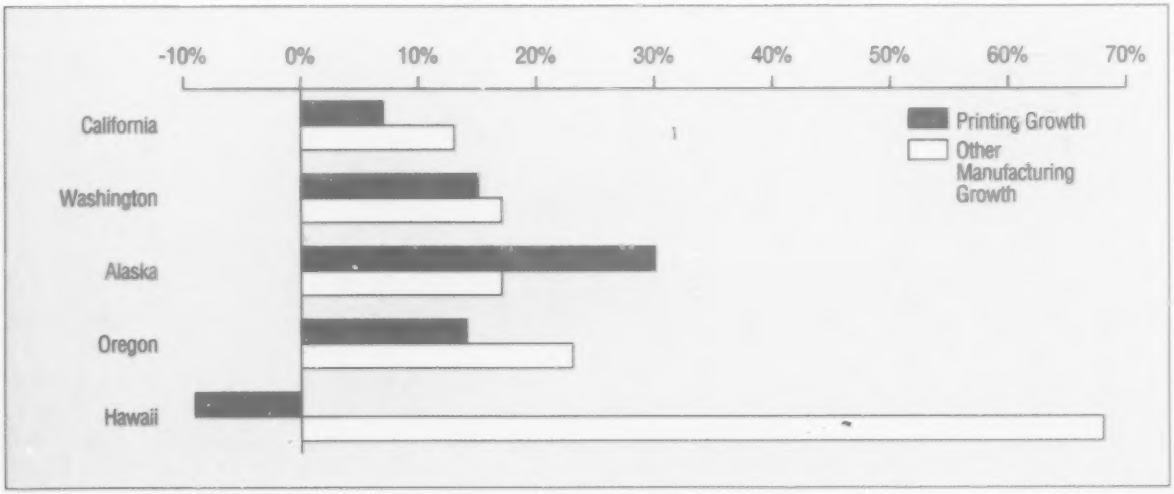


Printing Sites

State	Sites	%
California	4,757	80.0%
Washington	599	10.0%
Oregon	464	7.8%
Hawaii	93	1.6%
Alaska	33	0.6%
TOTAL	**5,946**	**100%**

Comparing sales for these states with number of sites, California becomes less monolithic. The reason: the other, less urban, states, have proportionately fewer large printers, and thus a larger universe of small ones vis a vis their total volume. In fact, some of the spread may be due to local economic factors. Average sales of $1.36 million in Hawaii versus $1.23 million in Oregon could mean slightly larger printers, on average, in Hawaii. It could also mean that printing is more expensive in Hawaii.

Printing Employment



As discussed in the introduction, this is, relatively speaking, an economically healthy part of the country. It's useful in this context to remember that printing tends to reflect the general state of the local economy, and that it rises or falls along with that economy. California is essentially the only one of these states with a truly diversified economy. The others are generally dependent on solely one or two major sources of income: petrochemicals (Alaska), tourism (Hawaii), aircraft (Washington) and wood products (Oregon). Such dependent economies are vulnerable to threats as various as oil spills and Legionnaire's disease, or even the threat of world peace.

States	Employees
California	75,809
Washington	7,500
Oregon	6,384
Hawaii	1,514
Alaska	409
TOTAL	**91,616**

Leading Printers in Major Markets

Company, Location	Sales
ADVERTISING PRINTERS	**Total 390.7**
Graphic Arts Center, Portland, OR	45.0
Anderson Lithograph, Los Angeles, CA	30.0
George Rice & Sons, Inc., Los Angeles, CA	30.0
K/P Graphics, Berkeley, CA	23.0
Frye & Smith, Costa Mesa, CA	17.0
Penn Lithographics, Cerritos, CA	17.0
Welsh Graphics, Pasadena, CA	17.0
Madison/Graham ColorGraphics, Los Angeles, CA	15.0
The Dot Printer, Inc., Irvine, CA	14.0
George Lithograph Company, San Francisco, CA	14.0
United Graphics, Seattle, WA	13.5
Arts & Crafts Press, San Diego, CA	13.0
Franklin Press, San Bernardino, CA	12.0
Lithographix, Inc., Los Angeles, CA	10.5
Overland Printers, Inc., Hawthorne, CA	10.5
Rush Press, San Diego, CA	10.0
Alan Lithograph, Inglewood, CA	10.0
Muller Printing, Santa Clara, CA	9.5
Thomson Lithograph, Palo Alto, CA	9.0
Cal Central Press, Sacramento, CA	8.0
Trend Offset Printing Service, Los Alamitos, CA	8.0
Mariposa Press, Benicia, CA	8.0
Sinclair Printing Company, Los Angeles, CA	6.0
Warren's Waller Press, South San Francisco, CA	6.0
Gardner Lithograph, Buena Park, CA	5.5
Relief Printing Corp., Baldwin Park, CA	5.0
Craftsman Press Printing, Seattle, WA	5.0
George Rice & Sons, Inc., Seattle, WA	4.0
Fricke-Parks Press, Fremont, CA	3.5
Bert-Co Graphics, Los Angeles, CA	3.5
Smith Lithographic Arts, Inc., Tustin, CA	3.0
Sapir Press, South San Francisco, CA	3.0
Dynagraphics, Inc., Carlsbad, CA	2.2

Company, Location	Sales
INSERT PRINTERS	**Total 385.0**
Riverside County Publishing, Riverside, CA	85.0
GBP Industries, Pittsburg, CA	40.0
Sun Litho Inc., Van Nuys, CA	35.0
Treasure Chest Advertising, City Of Industry, CA	30.0
Rotary Offset Sales Company, Seattle, WA	26.5
RFD Publications, Tigard, OR	26.5
Treasure Chest Advertising, West Sacramento, CA	23.0
Treasure Chest Advertising, Pomona, CA	21.0
Treasure Chest Advertising, Portland, OR	20.0
Continental Graphics, Los Angeles, CA	16.0
Trend Offset Printing Service, Los Alamitos, CA	13.5
Wolfer Printing Company, Commerce, CA	8.0
California Offset Printers, Glendale, CA	7.0
Crest Graphics, Los Angeles, CA	7.0
Fricke-Parks Press, Fremont, CA	6.0
Andrews Printing Co., Lakewood, CA	6.0
Alan Lithograph, Inglewood, CA	6.0
World Color Press, Inc., Merced, CA	5.0
Warren's Waller Press, South San Francisco, CA	3.5
COMMERCIAL/SPECIALTY	**Total 346.8**
Scranton Corporation, Tustin, CA	34.0
George Rice & Sons, Inc., Los Angeles, CA	33.0
Pacific Lithograph Company, San Francisco, CA	30.8
Jostens Printing & Publishing, Visalia, CA	25.0
Continental Graphics, Los Angeles, CA	20.0
Fong Brothers Printing, Brisbane, CA	16.0
Sinclair Printing Company, Los Angeles, CA	13.5
Craftsman Press Printing, Seattle, WA	13.5
The Dot Printer, Inc., Irvine, CA	12.5
Lithotype Company, South San Francisco, CA	12.0
H. S. Crocker Co., South San Francisco, CA	11.0
Madison/Graham ColorGraphics, Los Angeles, CA	11.0
Pacific Envelope Company, Anaheim, CA	11.0

Company, Location	Sales
Avery International, Pasadena, CA	10.0
Anderson Lithograph, Los Angeles, CA	10.0
Graphic Arts Center, Portland, OR	10.0
Bert-Co Graphics, Los Angeles, CA	9.0
Madison/Graham ColorGraphics, San Francisco, CA	9.0
Franklin Press, San Bernardino, CA	8.0
Overland Printers, Inc., Hawthorne, CA	7.5
Relief Printing Corp., Baldwin Park, CA	7.0
Gardner Lithograph, Buena Park, CA	6.5
Lithographix, Inc., Los Angeles, CA	5.5
Alan Lithograph, Inglewood, CA	5.5
Cal Central Press, Sacramento, CA	5.0
Smith Lithographic Arts, Inc., Tustin, CA	2.5
George Rice & Sons, Inc., Seattle, WA	2.5
Riccobon Business Forms, Santa Fe Springs, CA	2.0
Advance Business Forms, Mira Loma, CA	2.0
Creative Web Systems, Inglewood, CA	1.5
MAGAZINE PRINTERS	**Total 283.8**
Arcata Graphics Company, San Jose, CA	55.0
R.R. Donnelley & Sons Company, Torrance, CA	50.0
GBP Industries, Pittsburg, CA	25.0
World Color Press, Inc., Merced, CA	25.0
Ringier America, Inc., Fullerton, CA	23.0
Continental Graphics, Los Angeles, CA	17.0
California Offset Printers, Glendale, CA	12.0
Treasure Chest Advertising, Pomona, CA	10.0
Treasure Chest Advertising, West Sacramento, CA	10.0
Wolfer Printing Company, Commerce, CA	10.0
Recorder Sunset Press, San Francisco, CA	7.5
Craftsman Press Printing, Seattle, WA	7.0
RFD Publications, Tigard, OR	7.0
Cal Central Press, Sacramento, CA	6.0
Crest Graphics, Los Angeles, CA	4.5
Dynagraphics Inc., Carlsbad, CA	4.3

Demographics in Pacific Region

Population and Migration

State	Population	Rank	Migration (See text)	Change (%, 80-86)
California	26,981,000	1	1,778,000	14.0
Washington	4,462,000	20	105,000	8.0
Oregon	2,698,000	30	−49,000	2.5
Hawaii	1,062,000	39	16,000	10.1
Alaska	534,000	49	71,000	32.8
TOTAL	35,737,000		1,921,000	

Sometimes it seems like every third person in the known world wants to live in California—and, from currently available migration figures, they seem to be making good on that desire in record numbers. In fact, all five of these states are seen as desirable places to live. The natives aren't entirely happy about that, and in fact, Oregonians quip they're going to change the state motto to "Go Away." (It is said that even in Alaska, which has a population density only slightly heavier than Mars, there are people who think it's getting crowded.) The populations of all these states are well

Potential Labor Pool

State	Age 15-24 (% Population)	Unemployment Rate (%)
Alaska	18.7%	10.8
Hawaii	17.9%	4.8
California	17.5%	6.7
Washington	16.6%	8.2
Oregon	15.5%	8.5

Tables of leading printers given in order of overall market size. This will vary from region to region.

Company, Location	Sales
Frye & Smith (Am. Signature), Costa Mesa, CA	4.0
Warren's Waller Press, South San Francisco, CA	3.5
Mariposa Press, Benicia, CA	2.0
Creative Web Systems, Inglewood, CA	1.0

BUSINESS FORMS PRINTERS	Total 260.3
Vanier Graphics Corporation, Santee, CA	63.0
Apperson Business Forms, Los Angeles, CA	32.0
Riccobon Business Forms, Santa Fe Springs, CA	22.0
Advance Business Forms, Mira Loma, CA	18.0
Wright Business Forms, Inc., Portland, OR	17.5
Sterling Business Forms, Central Point, OR	16.5
Block Business Forms, Portland, OR	16.0
K/P Graphics, Berkeley, CA	15.0
Avery International, Pasadena, CA	15.0
Wright Business Forms, Inc., Portland, OR	12.0
Five Day Business Forms Mfg., Anaheim, CA	11.8
Pacific Envelope Company, Anaheim, CA	8.0
Wright Business Forms, Inc., Kent, WA	5.5
National Printing Converters, Van Nuys, CA	5.5
Forms Engineering Company, La Palma, CA	3.0

LABEL/WRAPPER PRINTERS	Total 232.7
Avery International, Pasadena, CA	110.0
H.S. Crocker Co., South San Francisco, CA	42.0
GM Nameplate, Seattle, WA	19.0
Vanier Graphics Corporation, Santee, CA	13.0
Label-Aire, Inc., Fullerton, CA	9.0
Bert-Co Graphics, Los Angeles, CA	8.5
National Printing Converters, Van Nuys, CA	8.5
MPI Label Systems, Stockton, CA	8.0
Pacific Lithograph Company, San Francisco, CA	7.7
Bee Line Inc., Union City, CA	5.5
Sterling Business Forms, Central Point, OR	1.5

Company, Location	Sales
CATALOG PRINTERS	**Total 232.0**
Graphic Arts Center, Portland, OR	65.0
George Rice & Sons, Inc., Los Angeles, CA	27.0
Continental Graphics, Los Angeles, CA	25.0
Anderson Lithograph, Los Angeles, CA	20.0
R.R. Donnelley & Sons Company, Torrance, CA	15.0
World Color Press, Inc., Merced, CA	15.0
Craftsman Press Printing, Seattle, WA	9.0
Welsh Graphics, Pasadena, CA	7.0
Ringier America, Inc., Fullerton, CA	7.0
Frye & Smith (Am. Signature), Costa Mesa, CA	6.0
Wolfer Printing Company, Commerce, CA	6.0
Mariposa Press, Benicia, CA	6.0
Recorder Sunset Press, San Francisco, CA	5.5
Madison/Graham ColorGraphics, Los Angeles, CA	5.0
GTE Directories Press, Los Angeles, CA	5.0
California Offset Printers, Glendale, CA	3.5
Griffin Printing & Lithograph, Glendale, CA	3.0
Crest Graphics, Los Angeles, CA	2.0

DIRECTORY PRINTERS	Total 164.0
World Color Press, Inc., Merced, CA	70.0
GTE Directories Press, Los Angeles, CA	45.0
Norwest Publishing Company, Portland, OR	40.0
Ringier America, Inc., Fullerton, CA	5.0
Andrews Printing Co., Lakewood, CA	3.0
Griffin Printing & Lithograph, Glendale, CA	1.0

DIRECT MAIL PRINTERS	Total 138.0
Vanier Graphics Corporation, Santee, CA	31.0
K/P Graphics, Berkeley, CA	16.0
Penn Lithographics, Cerritos, CA	15.5
Anderson Lithograph, Los Angeles, CA	15.0

Company, Location	Sales
Forms Engineering Company, La Palma, CA	12.0
Krupp Taylor USA, Los Angeles, CA	11.5
Creative Web Systems, Inglewood, CA	6.5
Bert-Co Graphics, Los Angeles, CA	8.5
Advertisers Mailing Service, Paramount, CA	7.5
United Graphics, Seattle, WA	6.0
Madison/Graham ColorGraphics, Los Angeles, CA	5.0
Sapir Press, South San Francisco, CA	3.5

BOOK PRINTERS	Total 70.0
R.R. Donnelley & Sons Company, Torrance, CA	40.0
Delta Lithograph Company, Valencia, CA	16.0
Griffin Printing & Lithograph, Glendale, CA	7.0
Trend Offset Printing Service, Los Alamitos, CA	3.0
Andrews Printing Co., Lakewood, CA	2.0
Adapt Electronic Publishing, San Francisco, CA	2.0

PREPRESS	Total 50.0
Balzer/Shopes, Brisbane, CA	13.5
Walker Graphics (Techtron), San Francisco, CA	12.0
Techtron Imaging Network, Los Angeles, CA	10.0
Color House, Inc., Burbank, CA	8.0
Toppan Graphic Arts Center, Santa Monica, CA	3.5
Frye & Smith, San Diego, CA	3.0

Figures given for sales are in millions of dollars. Data taken from Printmarkets, Trade & Technology Press, Stamford, Conn.

If you'd like to rent the list of names of people in any of the printing establishments in this section, please contact Jim Long, Direct Mail Services, Cahners Publishing, 249 W. 17th St., N.Y., N.Y. 10011; or call 1-800-537-7930.

educated, with reasonably high per capita incomes.

Readers should note that the database from which these listings is drawn contains only major printers, that is, printers who have 20 or more employees and who have at least $1 million in annual sales in a particular market. Readers familiar with the Geography of Print series will notice that this month's list is noticeably smaller than some of its predecessors. The Pacific region, with certain notable exceptions (see list) has comparatively few printers large enough to meet the criteria for our listing.

Income and Bank Deposits

State	Income (Per Capita)	Rank	Bank Deposit Increase 1985–1986, %
Alaska	$13,650	2	6.3%
California	11,885	7	5.1%
Hawaii	11,003	16	11.6%
Washington	10,866	19	6.2%
Oregon	9,925	31	6.3%
U.S. Average	$10,797		9.0%

Educational Attainment

State	High School (12+ years)	College (16+ years)
Alaska	82.5%	21.1%
Washington	77.6%	19.0%
Oregon	75.6%	17.9%
Hawaii	73.8%	20.3%
California	73.5%	19.6%
U.S. Average	66.5%	16.2%